

SPECIFICATIONS FOR ON-LINE/INTERNET TAX RESEARCH

General Requirements:

- ✓ An Internet based tax research service.
- ✓ This tax Research On-Line Service will provide users throughout the department and at remote locations with access to the latest tax news and a multitude of tax research information as described below.
- ✓ Accessible 24 hours – 7 days a week via the Internet.
- ✓ Accessible to 35 users CONCURRENTLY.
- ✓ System must allow for a designated administrator to approve user IDs, passwords, to assign, delete and reassign passwords. Must allow for unlimited user IDs with the 35 concurrent users.
- ✓ Must provide Online and toll free nationwide phone support available 7 days/24 hours.
- ✓ Must provide initial training to the Department for the use of the online/internet software and additional annual group training at the Department's request.
- ✓ Annual contract with the option to renewing for four additional year periods based on the same terms and conditions and pricing provided in bid.
- ✓ Provide pricing for year one, two, three, four and five.
- ✓ Exercise of options years will be determined by an evaluation of Vendor's performance based on unavailability, unreliability and unresolved technical problems.
- ✓ If vendor fails to promptly provide on-line services or to take the necessary actions(s) to ensure future performance in conformity with contract requirements we have the right to reduce the contract price to reflect the reduced value of the service provided and/or terminate the contract with the vendor refunding the unused portion of the annual contract.
- ✓ Bid awarded all or none.
- ✓ At our request, the bidder will be required to furnish promptly any information that we may consider necessary to establish bidder meets required specifications as stated in ITB.

System functionality must provide the following:

- ✓ Advanced searching with a balanced search containing AND, OR, NOT words.
- ✓ Personalized e-mail notification for subject topic and customized searches.
- ✓ Ability to customize home page to user personal needs.
- ✓ Ability to save searches, audit trails and documents for future use.
- ✓ Available multi-state quick answer charts.
- ✓ Tools to quickly create a chart or table that provides pertinent tax information in one convenient table, with links to the controlling authority and detailed explanations. Lookup tool to quickly find state, county and local sales and use tax rates by zip code.
- ✓ Ability to quickly link from one document to related topics, explanations, code, regulations, annotations, history, committee reports and comparable statutes/regulations in other states.
- ✓ Ability to search archived information from: Internal Revenue Code, IRS Publications, Annotations & Explanations and State & Local Library

System Data Requirements:

Federal Tax Library:

- ✓ IRS Federal Tax Code – Internal Revenue Code (26USC)
- ✓ IRS Regulations – Code of Federal Regulations (26 CFR)
- ✓ Federal Tax Archives – minimum of 10 years of archives
- ✓ Federal Tax Handbook/Guide
- ✓ Federal Tax Reports
- ✓ Full text of tax legislation, including current, enacted and proposed legislation
- ✓ Weekly updates/newsletters
- ✓ Federal Tax Court Decisions
- ✓ IRS Rulings and Releases
- ✓ Internal Revenue Bulletins
- ✓ IRS Forms and Publications
- ✓ IRS Practice Guides (Internal Revenue Manual, MSSP Training Guide, Market Segment and ISP Materials)

State & Local Library:

- ✓ State Tax Laws for all 50 states and District of Columbia
- ✓ State Tax Regulations for all 50 states and District of Columbia
- ✓ State Tax Archives for all 50 states and District of Columbia – minimum of 10 years archives
- ✓ Annotations and Explanations for all states
- ✓ Daily news service covering recent tax developments.
- ✓ Current rulings of tax related court cases for all 50 states and District of Columbia (Supreme Court/Civil Appeals/Circuit Court/Administrative Law and Attorney General Opinions)
- ✓ Archive of rulings for all states and District of Columbia
- ✓ Federal court cases on state tax issues
- ✓ Miscellaneous official state materials
- ✓ Legislative highlights for all 50 states and District of Columbia
- ✓ Full text of tax legislation, including current enacted and proposed legislation for all 50 states and District of Columbia
- ✓ State and local tax forms and instructions
- ✓ Weekly state tax newsletter
- ✓ Multi-state Corporate Tax Guide with in-depth explanations and case annotations covering corporate income taxes and sales and use taxes levied in all 50 states plus the District of Columbia
- ✓ Ability to create charts and tables for all states with topics of our choosing using statutes, regulations, etc.
- ✓ Access to editorials, research papers, and opinions including: All States Tax Guide, Hellerstein & Hellerstein State Taxation or equivalent, Miscellaneous multi-state issues and Journal of Multi-state Taxation

Contact Person(s): Kathleen Abrams at 334-353-8137 or Ginger Buchanan at 334-242-1490